

The first Long-Range Plan of the South Coast Railroad Museum was adopted by the Board of Trustees in 1994. Since that time, the plan has been revised and updated periodically, as elements have been achieved or new challenges and opportunities identified. Nevertheless, the basic goals of the Plan have remained unchanged.

The Long-Range Plan has three broad, fundamental objectives, all vital to the achievement of the museum's Statement of Purpose and to the very survival of the organization. They are: (1) building and maintaining a strong organization; (2) professionalism in collections care and management; and (3) excellence and equity in programming.

To achieve these objectives, the Long-Range Plan focuses on a single orienting frame of reference: accreditation from the American Association of Museums. As the Long-Range Plan states, this approach was selected because: (a) the accreditation process provides "specific guidelines and mileposts for achieving each of these objectives" and a means whereby "specific elements of the Long-Range Plan can be developed and evaluated;" (b) "accreditation is a clear target toward which all effort — on the part of trustees, staff, and volunteers — can be directed;" and; (c) "accreditation provides a mechanism — the reaccreditation process — that will help ensure that objectives, once achieved, can be properly maintained and nurtured."

The Long-Range Plan is expressed in a formal 10-page document that includes a detailed year-by-year implementation timetable, which covers each of the three broad objectives, as well as the accreditation process, itself. The program is highly specific, delineating 66 distinct plan elements or goals, categorized by the major objectives under which each falls. Each of these individual goals, which have been developed after review of AAM's Organizational Self-Study for Accreditation, has been placed on the implementation timetable. Specificity of the Long-Range Plan is further enhanced by the use of quantification where possible.

A brief discussion of each of the three major objectives, along with a sample listing of a few of the specific goals under each (quoting from the actual language or providing examples, where practical), should help to clarify:

1. Building And Maintaining A Strong Organization is identified in the Long-Range Plan as "the ways and means of achieving the museum's mission." This broad category encompasses human resources (board, committees, staff, volunteers), physical plant (building, grounds, insurance), financial resources (endowment

and income-generating activities), and governing and organizational documents (policies and procedures, job descriptions, Annual Plans, long-term plans, and Master Plan).

Among the 33 specific Long-Range Plan elements that seek to build organizational strength and stability are:

- "Prepare written job descriptions for all committees;"
- "Establish a written procedure for trustee recruitment and orientation;"
- "Implement an annual trustee/senior-staff retreat and reinstate an Annual Dinner — to build solidarity;"
- "Conduct accreditation workshops for staff, trustees, and volunteers;"
- "Increase the endowment principal to \$200,000."

2. Professionalism In Collections Care And Management

The Long-Range Plan argues that "the museum's most important responsibility is the proper care and management of the historical landmark and of the objects and materials that comprise the museum collections. The museum must be a conscientious steward of the precious items that have been entrusted to it." The Long-Range Plan has 13 elements related to collections care and management. They include:

- "Review and update, if necessary, the Collections Management Policy;"
- "Integrate all remaining CAP and MAP-II recommendations into upcoming Annual Plans;"
- "Establish a schedule and procedure for the regular inventory and inspection of the collections;"
- "Review and update the museum's Guidelines for the Restoration of Goleta Depot."

3. Excellence And Equity In Programming

According to the Long-Range Plan, "the museum's exhibits and educational programs are the mechanisms we use to share the collections and our accumulated knowledge with visitors — today and in the years to come. Those programs and exhibits should be based on fact; they should be presented in a manner that is effective and provocative; and they should be made available to the widest possible audience, on a nondiscriminatory basis."

There are 19 elements in the Long-Range Plan under Excellence And Equity In Programming. These include:

- "Develop and implement a program for the effective interpretation of the historical landmark."
- "Implement recommendations from the Access Unlimited accessibility study (commissioned in 1996)

to help ensure that persons with disabilities have maximum access to museum programs and facilities."

- "Review all museum programs involving the printed or spoken word to achieve improved accessibility for Spanish-speaking visitors."
- "Restore and refurnish [Goleta Depot's] waiting room, freight office, kitchen, bedroom, dining room, and parlor, removing intrusive elements and eliminating competing functions."
- "Devise and implement methods for evaluating the accuracy, effectiveness, and impact of all museum programs. Establish a procedure for revising programs based on these evaluations."

In 1991, the Board of Trustees established a Planning Committee, consisting of trustees, senior staff, volunteers, and general members. The committee was charged with the responsibility of conducting a systematic strategic-planning process and creating the museum's first comprehensive Long-Range Plan.

Steps taken by the Planning Committee included a critical word-by-word review of the Statement of Purpose; a reexamination of the Master Plan; an exhaustive itemization of museum needs and opportunities; and the selection of themes, goals, elements, and a basic strategy for the Long-Range Plan. The draft Long-Range Plan was presented and approved in concept by the Board of Trustees in 1993; the final version was adopted the following September.

The review and evaluation of Long-Range Plan elements is a continuous process for the museum's senior staff, while the board reviews Long-Range Plan progress on a periodic basis.

The director has used a variety of methods for tracking Long-Range Plan progress and impacts. These

methods include interviews, questionnaires and observations of visitor behavior, as well as demographic comparisons of actual versus potential audiences and studies of changes in museum audience through time. The results of these assessments, in turn, has helped to steer the Long-Range Plan process.

The Long-Range Plan has also benefited from comments offered by members of the museum community, who have reviewed the Plan in whole or in part, during the peer-review processes that are an integral part of the Museum Assessment Program and IMLS's various grant programs.

A more formal and elaborate review was conducted in 1996 by the Planning Committee, resulting in a few revisions and element-rescheduling within the overall plan. It is customary for elements that are unfinished in their target year to be folded into the annual planning for the following year.

Another comprehensive review and revision of the Long-Range Plan is underway at this time and should be completed during 2005. While the plan's three fundamental objectives will remain unchanged, some modifications to the list of plan elements and to the timetable are anticipated. The new plan will extend out to the year 2010, incorporating changes based on the successes and failures of the current plan. It is anticipated that some new elements will be added to the revised plan and that some of the unfinished elements will be updated or, perhaps in a few instances, replaced.

The director is given considerable latitude to take advantage of opportunities or respond to problems that may arise; thus he may advance or postpone the scheduling of Long-Range Plan elements when necessary. In general, plan elements involving only a nominal outlay of funds may be implemented by the director without further review; others require board authorization.

Project Narrative: Revitalizing the South Coast Railroad Museum Volunteer Program

1. Project Design: Describe the project and its goals.

Grant funds, if awarded, will be used to conduct a comprehensive reformulation and revitalization of the South Coast Railroad Museum's volunteer program. The overall project goal is an improved and strengthened volunteer program — one that is better able to meet the audience needs and other challenges that the museum faces today or will face in the years to come.

The project is an outgrowth of a 2004 needs assessment, conducted by the museum director in response to the critical importance of volunteers in achieving the museum's mission, as expressed in the organization's Long-Range Plan.

Recent events at the museum provided further incentive for this preliminary assessment of volunteer-program needs. Strains on the volunteer program have resulted from marked increases in the numbers and kinds of volunteerism at the museum, due largely to the recent creation of a successful and growing internship program in partnership with the anthropology and history departments at the nearby Univ. of Calif., Santa Barbara, coupled with the expansion of the museum's all-volunteer guide program aboard Amtrak's *Coast Starlight* train. At the same time, the need for more volunteers at the museum site, itself, has grown at an even faster rate, as the roles of our paid staff (especially that of the director) have been shifting away from tasks that could be performed equally well by volunteers (Traditionally, the paid staff has performed "fill-in" duties to back-up the volunteer corps, such as operating the train ride, sharing the model-railroad exhibit, or manning the cash register when a volunteer is unavailable.), in favor of more job-appropriate administrative, planning, program-development, marketing and fundraising activities.

Specific Project Goals

The preliminary needs assessment focused on six main areas of volunteerism: (i) recruitment, (ii) orientation, (iii) continuing education, (iv) supervision (v) evaluation and (vi) retention. It examined the strengths and weaknesses of the current program, leading to the identification of nine key needs that were considered most vital to the ultimate success of the volunteer program. They are:

1. Increase Volunteer Numbers. Goal: A net increase in the number of volunteers by at least 12. (This would cover all current staffing needs, with a small reserve and without requiring any volunteers to give additional hours beyond their basic monthly commitment. Any increase of more than 12 volunteers could be used to expand current program schedules and offerings.

2. Recruit To Achieve Greater Diversity. Goal: To improve our ability to relate to the everyday lives of our audiences, and with the goal of expanding those audiences, the museum should seek to add more volunteers from segments of its community/audiences that are under-represented in the current volunteer pool (includ-

ing Latinos, women, and parents of young children).

3. Improve Volunteer Orientation. Goal: The museum should provide a more comprehensive and uniform orientation (e.g., welcome interviews, printed materials, meetings, classes, activities) for all incoming volunteers, regardless of their chosen area(s) of service.

4. Provide More Educational Opportunities. Goal: To make our volunteers more effective in their educational and other duties, and in recognition of the fact that the volunteers, themselves, constitute an important museum audience in their own right, the museum should focus attention and energy of developing an improved program of specialized and continuing education for its volunteers.

5. Update All Written Materials. Goal: A thorough review and reformulation is needed for the many written materials (policies, forms, procedures, plans) that underlie and support all aspects of the volunteer program.

6. Develop A Program To Reward Volunteers. Goal: The current, inconsistent pattern of rewards & benefits for voluntary service should be replaced with a formal incentive program supported by a written plan and procedure.

7. Develop A Procedure For Volunteer Retention. Goal: The prevailing practice of largely ignoring the issue of volunteers renewing their commitment should be reconsidered in favor of a more proactive retention procedure.

8. Improve Supervision/Program Evaluation. Goal: To ensure that the volunteer program is in accord with the museum's standards of excellence and professionalism (as these are expressed in the Statement of Purpose and Long-Range Plan), the museum should develop a formal program of volunteer supervision and evaluation.

9. Achieve Greater Consistency. Goal: In recognition of the fact that many of the volunteer program's shortcomings result from failures to be consistent across personnel or staffing areas, and persistent through time, any comprehensive redesign of the volunteer program should pay close attention to these fundamentally-important qualities.

These nine needs comprise the specific goals and central themes of the proposed project. Each will receive additional attention in subsequent sections.

Methods Overview

The project will be conducted in accordance with a set schedule and organized sequence of activities. These project methods and procedures will be detailed in Sections 6 and 7, but can be summarized here.

Program participants will include all staff members and the volunteers, themselves, museum visitors and audience members, and other stakeholders (trustees, financial sponsors, and museum members). Many of these persons will serve on a steering committee that will coordinate project activities. The project will also call upon a number of outside consultants to provide objective insight and to serve as project facilitators.

Data collection will include a literature review, interviews, questionnaires, and the observation of behavior. A more comprehensive needs assessment, building upon

the preliminary assessment described here, will be conducted at the onset of the project and will lead to the preparation of a project Implementation Plan. This Plan, in turn, will outline the specific procedures for achieving the goals set forth above.

2. Grant Program Goals. Describe which of the three Museums for America goals the project addresses.

The proposed project addresses the *Sustaining Cultural Heritage* goal of the MFA program.

The specific cultural heritage for which the museum is steward includes (i) Goleta Depot, the museum centerpiece and landmark building, now listed on the National Register of Historic Places; (ii) the artifacts, photographs and printed materials that comprise the museum collections; and (iii) the body of knowledge, the history, and the traditions that accompany, describe, and attach value to these more tangible cultural things.

The museum's volunteers help to sustain this heritage in a variety of ways – for example, through their support of the paid staff in collection care and management, housekeeping and building maintenance (Our UCSB interns, for example, help to maintain the collection records, conduct condition reports, etc.). Volunteers also assist with the research associated with these heritage items (A volunteer recently completed background research on the museum's caboose, for example.) and also aid in the development of exhibits that utilize and interpret these items.

Because many volunteers have greater access to the historical landmark and items on display than does the general public, it is crucial that they have been appropriately trained to understand how collection items should be treated. In addition, these volunteers serve a crucial buffering role in safeguarding these resources from theft, vandalism, and any mischief that could be caused by museum visitors.

Volunteers also act to preserve the museum's cultural heritage indirectly — by freeing up the paid staff's time for collections care, research, publications, exhibit work and other activities related to the museum's cultural stewardship.

But sustaining cultural heritage is more than just preserving or conserving these material items and informational resources in a physical sense. Sustaining cultural heritage must also mean ensuring that these items continue to be valued by their communities and constituent groups ... that their symbolic meaning and intrinsic value is neither lost nor ignored.

The museum's volunteers serve this essential function because they are the institution's primary means of communicating information about these cultural things to the general public. Indeed, it is estimated that about 80% of the contacts between museum personnel and its audiences (more than 20,000 persons annually) involve volunteers rather than paid staff. Moreover, because the museum shares the building and most of its collections through period-room presentations rather than conven-

tional case-and-label displays (for which there is little available space), the printed word is far less important than verbal interpretation provided by volunteers in delivering cultural-heritage information to our audiences. Of course, the fact that the heritage message is coming from a living, breathing person adds a measure of poignancy that few labels can match.

Finally, volunteers demonstrate by powerful example how valuable these cultural things are: The gift of the volunteer's own precious time, making the act of sharing possible, is an unmistakable testimony to how important these items and ideas are, how much they are treasured.

3. Describe how your proposal relates to your mission statement and strategic plan. Describe how the project will serve as an investment in capacity. Discuss the long-term impact of this project after funding ends.

Relationship of Project to Statement Of Purpose

Volunteers have always been a vital component of the South Coast Railroad Museum's strategy for achieving its objectives, as they are expressed in its Statement of Purpose. In part, this is a reflection of the enormous commitment of time that the museum's volunteers devote — an impressive total of about 5,100 hours annually. But, the volunteer corps' is important not only because of the **number** of hours that they give, but also because of the **nature** of those hours — the vast majority of which involve face-to-face interactions with the general public. Most of these contacts between volunteer and visitor involve the delivery of nearly all of the educational and recreational opportunities, activities and services that are referenced in the Statement of Purpose.

The Statement of Purpose also stresses the importance of professionalism and program excellence as museum ideals. It is imperative that the volunteer program be an integral part of this campaign for excellence. Accordingly, the objectives of professionalism and excellence have been incorporated into the specific project goals outlined above (See, for example, Goal #8).

Relationship of Project to Long-Range Plan

Volunteers are mentioned repeatedly in the museum's Long-Range Plan (LRP), further underscoring the importance of the volunteer program to the ultimate achievement of the museum's mission.

Under the topic of "Building And Maintaining A Strong Organization," the volunteer program is the subject of five specific LRP elements. These include:

1. Evaluate the long-term role of volunteers versus paid staff in carrying out the museum's mission.
2. Enhance and maintain a regular program of volunteer recruitment, orientation, continuing training, and evaluation.
3. Train self-selected volunteers as "operations and safety officers." Insure that a senior staff member or safety officer is always present during museum hours.
4. Determine the minimum number of volunteers required in each area to maintain all museum visitor functions.

Keep volunteer strength in all areas at one person more than these minimums.

5. *Establish an organizational format that will give volunteers with the desire and ability to lead the opportunity to do so.*

The volunteer program is also the subject of one of the LRP elements under "Professionalism in Collections Care & Management." Specifically,

6. *Determine the volunteers' role in collections care and management, including landmark maintenance, and implement a suitable program with appropriate training and supervision.*

All of these specific LRP goals are important to the achievement of the museum's mission. Many are vital to the very survival of the organization. All six elements are addressed in the proposed project. Most central to the project, of course, is the second element ("Enhance and maintain a regular program of volunteer recruitment, orientation, continuing training, and evaluation."), which unquestionably has the most far-reaching consequences, both for the museum and for the public that it serves.

An Investment in Institutional Capacity

The proposed project will contribute substantially to the museum's institutional capacity, by improving and enhancing an existing museum asset – the volunteer program – that has proven to have a major impact on the museum's organizational and financial strength and its ability to deliver quality public programs and services.

The impact of the volunteer program, in its present form, on the museum's audiences and program services has been discussed above. Simply stated, because they give so many hours and are responsible for such a large share of the total visitor contacts, the volunteers make it possible for the museum to do more, to serve more people, and to deliver more programs and services than would be possible if the museum had to rely entirely on paid staff and its limited financial resources.

The effects that the volunteer program has on the museum's financial condition and its ability to grow or to withstand economic challenges take a number of forms.

First and most importantly, the volunteers relieve the museum of an enormous share of the financial burden that would need to be borne if the museum had to pay for all the skilled labor that the volunteers supply (If, for example, one applies the \$17.19 per hour rate that the National Park Service, a museum program partner, uses to value its volunteers, the 5,100 hours that the museum's volunteers donate each year would add another \$88,000, or 77%, to the museum's annual operating budget of about \$113,000).

Second, the volunteers have an indirect effect on the organization's financial strength and growth-potential because their contributions of time allow the museum staff to concentrate their efforts on other pursuits, including fund-raising, program development, marketing and audience building.

Finally, when the volunteers do their job well, it is reflected in higher return-visitation rates, more donation-box contributions, more visitors choosing to become members, and in other ways that affect the bottom line. Moreover, the volunteers have proven to be important financial supporters of the museum in their own right.

The proposed project is designed to improve and enhance this valuable program, magnifying its effects on institutional capacity. Consider these examples:

- ✓ The project's first goal is to increase the number of volunteers. This will have two main effects: (i) it will allow program enrichment and/or expanded schedules for visitation and use, (ii) it will free up more staff time for those activities that make the museum better, stronger, and more able to meet any challenges — fund-raising, planning, program development, care of collections.
- ✓ Expanding the diversity of the volunteer corps – Goal #2 – will enable the volunteers to communicate with and relate to a broader and more varied audience.
- ✓ Two of the project goals, #3 and #4, focus on improved training – orientation, specialized training and continuing education – all of which will make the museum more effective in delivering the wide range of programs and services that are the volunteers' responsibility.

Similarly, the other project goals will also help to make the the museum stronger and better able to serve its community and constituents.

The Project's Long-Term Impacts

The museum has a vested interest in seeing that the changes brought about by the proposed project are lasting ones, continuing well beyond the period of IMLS funding. This concern is reflected throughout the project goals.

- ✓ Goal #9, for example, focuses broadly on the importance of maintaining consistency in the volunteer program, and on persistence through time.
- ✓ Similarly, written materials (Goal #5) are one important means of ensuring that today's successes are not lost, today's failures not forgotten. They provide an enduring record of individual and group achievement, of problems and their solutions.
- ✓ Volunteer retention and rewards (Goals #6 & #7) are of great value because they will help to guarantee a stable volunteer force, one that will persevere through time.
- ✓ Concern for long-term consequences is also why the project takes a **systemic** approach to the volunteer program. Thus, for example, while we talk about expanding the volunteer ranks by a specific number of new individuals, the project design also focuses on enduring systemic qualities, such as plans, procedures and routines — which can help to ensure that successful steps can be repeated over and over again.

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4. Describe how the institution arrived at its strategic plan, including the planning process and participants. Describe how institution's financial resources support its strategic plan and the museum's long term stability.

The process that the museum has used to develop, review and update its LRP is described in the two-page summary that precedes this narrative and will not be repeated here. The summary also describes the Planning Committee and the other participants in that process — including staff, trustees, members, visitors, other stakeholders, and peers in the museum community — and their respective roles and contributions.

The LRP is built upon the foundation provided by the museum's Statement of Purpose. Created in 1988, less than a year after the museum had participated in its initial MAP review, the Statement of Purpose was an effort to translate what had been learned from MAP about museum standards and best practices and apply these specifically to the railroad museum, its subject matter and its current and potential audiences. The result was a series of related goals and objectives, including education, community service, responsible care of collections, and adherence to high standards of professionalism.

The LRP, in turn, resulted from a methodical line-by-line examination of the Statement of Purpose and a lengthy discourse by the museum's long-range planners over how the various goals set forth in the Statement could be achieved. The decision to use AAM accreditation as the guiding framework for the LRP also came from our MAP experience and the recognition that accredited museums could be used as models for achieving the goals set forth in the Statement of Purpose.

Relationships Between Financial Resources, Long-Range Plan and Long-Term Stability

The museum's LRP, its financial resources and the organization's long-term stability are closely interrelated. Nowhere is this more clear than in the LRP, itself, in which financial strength is identified as both (i) a fundamental institutional goal in its own right and (ii) a necessary condition for achieving all of the museum's other objectives.

The critical importance of financial resources is underscored by the preeminence of "Building And Maintaining A Strong Organization" in the LRP. This initial LRP section includes numerous elements that relate directly or indirectly to the organization's financial strength, including goals relating to balanced budgets, finding new sources of income, increasing annual revenue and support, and enlarging the museum endowment.

The Plan designers understood that financial strength was essential to the museum's survival and to the realization of its educational and other goals. That is why they wrote, "*Organizational strength and stability are the ways and means of achieving the museum's mission. The organization must have sufficient financial and human (staff, trustees, and volunteers) resources to*

sustain operations and to maintain its educational and conservation programs and activities."

It is no coincidence that the goal of financial stability stands at very top of the LRP elements list: To wit: "1. *Budget. Maintain balanced budget and increase annual revenues and support as needed to achieve staffing and other goals.*"

It is noteworthy that this economic focus has been proving successful: After a succession of operating-budget shortfalls, the museum is now proving itself able to achieve balanced budgets. The accompanying financial statements, for example, show that the museum attained an operating surplus of about \$1,800 in FY2002-03, which was increased to about \$7,400 in the most recently completed fiscal year. Over that two-year period, the museum also added over \$20,000 to its net worth.

These financial successes, in turn, are now permitting the museum to turn more of its attention toward program-related matters, with the operating surpluses supplying the funds to make these program additions and improvements possible.

5. Describe the proposal's intended audience and how the project will serve this audience. Briefly describe your area's demographics and how this intended audience fits within the institutional strategic plan.

There are two audiences of relevance to the project: (i) the broad general-public audience described in the museum's Statement Of Purpose and (ii) the volunteers, themselves.

The Statement of Purpose asserts that the "*museum seeks to educate all ages and segments of the general public.*" And, especially in light of its relatively specialized subject matter, the museum has done a comparatively good job of reaching this wide, general audience.

This, however, has been no accident. We constantly strive to expand our visitor base and to reach a more diverse public, by exploring new ways to market the museum and by developing new programs or modifying existing ones to better attract and serve the general public. Admission is by donation and the majority of programs are free — which helps to keep the museum available to the widest possible audience. For this reason, the museum's audience includes a high proportion of low- and medium-income families.

Similarly, we know from occasional surveys, as well as from anecdotal evidence, that the composition of the museum's audience tends to mirror the ethnic/racial makeup of Santa Barbara County — White 72.7%; Hispanic/Latino 34.4%; Asian/Pacific 4.1%; Black/African-American 2.3%; Other 1.4%. (The percentage totals exceed 100% [i.e., 114.9%] due to category overlap, especially for White and Hispanic/Latino). Based on figures from the 2000 U.S. Census, the Goleta community, itself, is somewhat less diverse (White 78.6%; Hispanic/Latino 22.3%; Asian/Pacific 6.4%; Black/African American 1.3%; Other 2.3%).

The southern portion of Santa Barbara County, including the city of Santa Barbara and the suburb of Goleta

(which incorporated in 2002), is also categorized by a relatively high percentage of retired persons (14.6% of Goleta residents are 65 or over) and college-educated, the latter reflecting the presence of the Univ. of Calif., Santa Barbara campus and other nearby institutions of higher learning, as well as the large number of research-and-development firms in the Goleta Valley. Median household income is over \$60,000 in Goleta, but that is more than matched by a high cost of living, with median home prices in the \$950,000 range.

For the proposed project, it is useful to divide both its audiences into categories, by differentiating between actual or **current audiences** (those already participating in museum programs) versus **potential audiences** (those who do not presently take part). Thus, there are four sub-groups of interest: (i) current (actual/continuing) general audience, (ii) potential general audience, (iii) current (actual/continuing) volunteers, and (iv) potential volunteers. The project will serve the needs of each of these sub-groups in somewhat different ways. Let's consider each in turn.

(i) **Current General Audience.** The needs of the museum's current general audience include a need for programs and activities that contribute to the quality of life through pleasant diversions and experiences that are enriching and informative. The proposed project will help to fulfill this need by ensuring that the museum's resources are shared by better trained and more able volunteers (Goals #3 and #4) and by augmenting the museum's capacity for offering a wider menu of program choices and/or expanded schedules of program availability (Goal #1). Most of the other project goals (see, for example, #8 and #9) will also improve the volunteers' ability to effectively serve the museum's general audience, which should result in greater visitor satisfaction, higher rates of return visitation and other desirable audience impacts.

The breadth and diversity of the museum's current general audience demands that the volunteers be able to communicate the museum's themes and subject matter in a way that connects with the daily lives of a wide range of people — young and old; male and female; local resident and tourist; rail fan or history buff as well as someone with little interest in our subject matter.

All aspects of the proposed project will concentrate on this seminal need. The recruitment program (Goals #1 & #2), for example, will seek out volunteer candidates who (i) possess the requisite interpersonal skills to meet this challenge and (ii) complement the existing volunteer corps. In turn, the programs of orientation (Goal #3) and continuing education (Goal #4) will be designed to sharpen these communications and social skills, while the programs of supervision and evaluation (Goal #8) will help to discover volunteer-program shortcomings, as well as to identify specific personnel problems.

(ii) **Potential General Audience.** The museum's **potential general audience** — those people who could be but are not currently being served — is also an important

project focus. The basic need of this potential audience is to be included in the museum experiences that now benefit others. The proposed project will serve this need by increasing the museum's capacities (especially Goal #1), creating new opportunities or expanding existing ones, thus allowing more **potential** audience members to become **current** recipients of the museum's services. Similarly, adding diversity to the volunteer group (Goal #2) will improve the museum's ability to reach a broader, more inclusive general audience.

(iii) **Current Volunteers.** The proposed project's other audience consists of the volunteers, themselves, but it would be incorrect to consider them an entirely **separate** group of people. Rather, the volunteers are a subset of the museum's wider, general audience, who benefit from the same educational and recreational experiences as these other museum beneficiaries. Indeed, the museum's volunteers are, in a sense, **elite** educational recipients because of the exclusive training and additional experiences that they undergo.

In addition to their personal educational needs, the volunteers needs include: (i) to be productive, (ii) to be acknowledged and appropriately rewarded for their efforts, (iii) to be given the tools and resources necessary to do the best possible job, and (iv) to feel satisfaction with their museum experience. The nine project goals address all of these volunteer needs.

(iv) **Potential Volunteers.** Unlike its current general audience, the museum's current volunteer group differs in significant ways from the local populations. The proportion of Hispanic/Latinos among the current volunteers, for example, is substantially lower than the 22%-35% reported for the city and county, respectively. Similarly, only about 38% of the current volunteers are female and the group also includes a disproportionate number of seniors.

The project goal of diversifying the volunteer base (#2) will work to make the special opportunities and rewards that are reserved for volunteers something that more people in these and other under-represented groups can enjoy.

6. Describe the time allotted for project activities, and how these fit into the museum's overall activities. Discuss the budget for completing these activities.

The proposed project will be implemented over an estimated 20-month timetable. This schedule is outlined in the accompanying Schedule of Completion. The distribution of project hours by participant and task is detailed in Table 1 (page 2 of the Budget Justification). Project activities and methods include:

Literature Review/Background Research. A study will be conducted of books, articles, internet sources, sample handbooks and other documents from other museums, and other resources that offer plans and best-practice recommendations for the design, implementation and maintenance of a museum volunteer program.

Project Committee. A committee comprised of the

museum director, other staff, volunteers, museum members, board representation, and other stakeholders will be formed. Its tasks will include providing direction to the planning process, drafting project documents, and serving as project liaison to the board of trustees, rank-and-file volunteers and other relevant groups.

Consultation. Professionals from the local museum and non-profit communities will serve as consultants to the project. Their duties and planned contributions are described in Section 7, below.

Needs Assessment. Using the current volunteer program as a starting point — and building upon the preliminary needs assessment described in Section 1 — a comprehensive assessment of needs and opportunities will be completed. The Needs Assessment will be a more formal and exhaustive treatment, including a detailed review of museum visitors, other segments of the museum's general audience, and the volunteers, themselves, with an emphasis on the needs and requirements of each group. The assessment will also examine the audience-volunteer relationship and how it may be improved and enhanced. Some of the data for this portion of the assessment will come from interviews and questionnaires administered to volunteers and representative members of the museum's broader audience.

The Needs Assessment will also include a review of volunteer-program personnel, plans, procedures, policies, and other written materials. This revised and expanded Needs Assessment will form the groundwork for all subsequent project activities.

Implementation Plan. Development of the project Implementation Plan will involve a multi-step process of drafting, review, testing and revision (See Schedule of Completion regarding the sequence of activities and allotments of time). All volunteers and other stakeholders will have opportunities to review and comment on the initial "Preliminary Draft Implementation Plan." The resulting Plan redraft ("Draft Implementation Plan") will then receive extensive evaluation during a trial period in which all Implementation Plan elements undergo pilot testing (see Schedule of Completion: Evaluation/Trial Implementation). The final Implementation Plan will be based on the successes and failures of this evaluation process and will be formally approved and adopted by the Board of Trustees, with recommendations from the Project Committee and director.

Carrying out the details of the Implementation Plan will involve a wide range of activities, covering the six major areas (i.e., recruitment, orientation, continuing education, supervision, evaluation and retention.) and focusing on the nine goals described in Section 1.

The Plan will contain a strategy for finding and recruiting the kinds of volunteers that are needed at the museum; a protocol for the orientation of new volunteers; specifications for specialized volunteer training and for a re-energized program of continuing education for volunteers; a discussion of how the volunteer program and the volunteers, themselves, can and should be supervised and evaluated; a procedure for volunteers to use in

renewing their commitment of service to the museum; specification of the resources that the volunteers need to do their job; and a system of incentives and benefits for acknowledging and rewarding museum volunteers.

The Plan will also call for the drafting of new and revised written materials, including policies, guidelines and procedures, reporting forms (for recording volunteer activity, daily visitation and use counts, procedural checklists, incidents and accidents, supply shortages, etc.) and resource materials (containing facts and background information that volunteers may use for interpretation, answering visitor questions, or their own edification).

Among the most important of these written materials will be a new Volunteer Handbook, which will become the essential reference for all museum volunteers. It will contain basic information about such topics as the museum's mission and programs; histories of both the museum and the landmark building; description of the organization's structure and manner of operation; sources of revenue; and discussions of the volunteer's role, qualifications, duties and responsibilities (e.g., ensuring visitor safety, representing and promoting the museum, providing educational and recreational services, etc.), and benefits. Appendices to the handbook will include many of the project's other written products (e.g., grievance policy, dress code, or emergency procedures).

Evaluation. Evaluation will occur throughout much of the project, from the testing of specific reporting forms to the more comprehensive assessment of the entire (Draft) Implementation Plan during the Trial Implementation. It will also include statistical and other formal comparisons of actual results versus the outcome targets set forth in the Implementation Plan.

The proposed project should fit well within a museum environment that is already rich with volunteer activity, including constant staff-volunteer and volunteer-public interactions. This situation should, for example, greatly facilitate on-the-job testing of contemplated changes in procedures or comparisons of new versus old reporting forms or policies. We expect that project activities will engage and stimulate volunteers and staff, alike, and that the project will be a healthy preoccupation at the museum throughout its course.

The budget for the proposed project is discussed in detail in the Budget Justification section. The allocation of personnel time for the various project tasks is in line with the museum's capabilities, which will help to ensure that all tasks are completed successfully and in a timely manner. Nevertheless, every effort has been made to keep the budget moderate and to avoid any unnecessary expenses. Ample use of existing staff members will contribute importantly to the museum's continued financial well-being (see Budget Justification for further discussion of this point), as well as providing the project with core personnel who have extensive knowledge of the existing volunteer program.

The budget plan also calls for the judicious and cost-effective use of consultants, who will be brought in at key points, where they will serve as project facilitators and

advisors who can bring a fresh, outside perspective to the tasks of program review and reformulation. Two of the consultants are donating their services to the effort, and the project will incur no travel costs for David Smith, the only consultant who lives outside of the local area.

7. Describe the project personnel, their qualifications, and how they will accomplish the project tasks, especially if they are current staff with other duties.

Key project personnel include (i) museum staff members, (ii) consultants and (iii) volunteers (See Table 1).

(i) **Project Leadership: The Museum Staff.** All three members of the museum's paid staff currently work closely with the volunteers and the volunteer program. Each is responsible for different aspects of volunteer orientation, training and incentive programs. All will participate in the proposed project. Their work on the project will come from that portion of the staff's time that is dependent on grants and other "soft money" sources (The Budget Justification includes a detailed discussion on this point.).

As the railroad museum's founding administrator, the director has traditionally taken the lead in the development of the volunteer program, a role that he will continue to play as the project's principal investigator. He has an extensive background and experience in the areas of evaluation and research design (including sampling, data collection, measurement systems, testing and analysis) – all valuable skills for the project. He has also co-authored an article on the design and implementation of an educational program (See Coombs 1977b, in his resume, Page 2, under "Selected Publications"). The director will chair the Project Committee, prepare all written-materials drafts and design the project evaluation program.

The assistant director has also worked with the volunteer program for over 20 years, mostly as the program's volunteer coordinator. She has participated hand-in-hand with the director in the creation of nearly all aspects of the program. The resource development coordinator's current duties include volunteer recruitment and maintaining the staffing calendar. The assistant director and resource development coordinator will both sit on the Project Committee, will prepare recommended items for inclusion in the Needs Assessment, will be responsible for early review of all printed-materials drafts, and will assist in the Evaluation and all other aspects of the project effort.

(ii) **The Role of Project Consultants.** The project will utilize the expertise of five consultants, who will serve as facilitators of the project-planning process. Their duties and responsibilities will include meeting with and advising the director and Project Committee; contributing to the Needs Assessment by making recommendations regarding observed problems, deficiencies or opportunities; suggesting courses of action; and reviewing draft printed materials and evaluation results.

Three of the consultants (Connie Buxton, Sally Isaacson and J.P. Wilson-Kirkpatrick) are from local museums, where each has played a major role in the development and operation of their institution's volunteer program. Buxton and Isaacson have both been classroom teachers and each now serves as director of education at a leading Santa Barbara area museum. Wilson-Kirkpatrick was the founding volunteer coordinator at the Santa Barbara Maritime Museum, where she developed a volunteer manual that has been adapted for use at several other local museums and nonprofit agencies.

The fourth consultant, David Smith, has worked with the museum and many of its existing volunteers through the museum's educational partnership with the National Park Service's Trails & Rails Program (which now co-sponsors the museum's Amtrak program). Smith's duties as volunteer coordinator for the Juan Bautista de Anza National Historic Trail bring him into contact with a wide range of volunteers and volunteer programs throughout much of California and Arizona.

The project will also utilize the services of a consultant from the Nonprofit Support Center of Santa Barbara County specifically during the Needs Assessment. Institutional needs assessment is a specialty of the Nonprofit Support Center.

All five consultants will be of great value to the project for their extensive backgrounds, their experiences with diverse volunteer programs, and for the alternative viewpoints they can bring to the project.

(iii) **Participation By Volunteers.** The museum's volunteers will also play a central role in the redesign of their program. Their contributions to the project will take a number of forms:

- ✓ The Project Committee will include a minimum of three volunteers. All current volunteers will have the chance to serve on the committee; some of the museum's most able volunteers will be urged to join.
- ✓ Regular (monthly) meetings of all volunteers and staff will be held during which project progress will be discussed and volunteer input sought.
- ✓ All volunteers will receive draft copies – for review and comment – of the Implementation Plan, Volunteer Handbook and all of the printed materials that volunteers will ultimately use on a routine basis. Volunteers serving on the Project Committee will be asked to review all plans and other printed materials.
- ✓ Volunteers will also participate in the project through their responses to interview and survey questions during the Needs Assessment.
- ✓ Selected volunteers will also assist in data collection, including the administration of questionnaires to visitors, other audience members, and potential volunteers.
- ✓ Volunteers will also be important to the Evaluation – through before-and-after comparisons of their attitudes to various aspects of the volunteer program, as well as via the testing of procedures, reporting forms, and other project elements.

Project Budget Form

SECTION 1: SUMMARY BUDGET

Name of Applicant Organization South Coast Railroad Museum

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

DIRECT COSTS

	IMLS	Applicant	Total
SALARIES & WAGES	<u>11,910</u>	<u>15,299</u>	<u>27,209</u>
FRINGE BENEFITS	<u></u>	<u>4,182</u>	<u>4,182</u>
CONSULTANT FEES	<u>3,720</u>	<u>5,580</u>	<u>9,300</u>
TRAVEL	<u>1,925</u>	<u></u>	<u>1,925</u>
MATERIALS, SUPPLIES & EQUIPMENT	<u>1,824</u>	<u></u>	<u>1,824</u>
SERVICES	<u>1,230</u>	<u></u>	<u>1,230</u>
OTHER	<u></u>	<u></u>	<u></u>
TOTAL DIRECT COSTS	\$ <u>20,609</u>	\$ <u>25,061</u>	\$ <u>45,670</u>
INDIRECT COSTS	\$ <u>3,091</u>	\$ <u>3,759</u>	\$ <u>6,850</u>

TOTAL PROJECT COSTS \$ 52,520

AMOUNT OF CASH-MATCH \$ 7,941

AMOUNT OF IN-KIND CONTRIBUTIONS \$ 20,880

TOTAL AMOUNT OF MATCH (CASH & IN-KIND CONTRIBUTIONS) \$ 28,820

AMOUNT REQUESTED FROM IMLS, INCLUDING INDIRECT COSTS \$ 23,700

PERCENTAGE OF TOTAL PROJECT COSTS REQUESTED FROM IMLS 45.1 %
(MAY NOT EXCEED 50%)

Have you received or requested funds for any of these project activities from another federal agency?
(Please check one) ☐ Yes ☒ No

If yes, name of agency _____

Request/Award amount _____

Project Budget Form

SECTION 2: DETAILED BUDGET

Year ☒ 1 ☐ 2 ☐ 3 - Budget Period from 8 / 1 / 05 to 7 / 31 / 06

Name of Applicant Organization South Coast Railroad Museum

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

SALARIES AND WAGES (PERMANENT STAFF)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
<u> </u>	()	245 hrs @\$17.43	4,271		4,271
<u> </u>	()	119 hrs @\$15.10	1,797		1,797
<u> </u>	()	87 hrs @ \$12.16	1,058		1,058
<u> </u>	(55)	534 hrs @ \$17.19		9,179	9,179
TOTAL SALARIES AND WAGES \$			7,126	9,179	16,305

SALARIES AND WAGES (TEMPORARY STAFF HIRED FOR PROJECT)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
<u> </u>	()				
<u> </u>	()				
<u> </u>	()				
<u> </u>	()				
TOTAL SALARIES AND WAGES \$					

FRINGE BENEFITS

RATE	SALARY BASE	IMLS	APPLICANT	TOTAL
<u> </u> 35.38 % of \$	4,270		1,507	1,507
<u> </u> 45.28 % of \$	1,797		814	814
<u> </u> 17.28 % of \$	1,058		183	183
TOTAL FRINGE BENEFITS \$			2,503	2,503

CONSULTANT FEES

NAME/TYPE OF CONSULTANT	RATE OF COMPENSATION	No. of Days (or HOURS) FOR PROJECT	IMLS	APPLICANT	TOTAL
<u> </u>	\$100/hr (HOURLY)	12 hrs	1,200		1,200
<u> </u>	\$50/hr	18 hrs	900		900
<u> </u>	\$40/hr	18 hrs	720		720
<u> </u>	\$45/hr	31 hrs		1,395	1,395
<u> </u>	\$60/hr	40 hrs		2,400	2,400
TOTAL CONSULTANT FEES \$			2,820	3,795	6,615

TRAVEL

FROM/TO	NUMBER OF: PERSONS DAYS	SUBSISTENCE COSTS	TRANSPORTATION COSTS	IMLS	APPLICANT	TOTAL
3,285 miles @	() ()					
\$0.35/mile	() ()		1,150	1,150		1,150
<u> </u>	() ()					
<u> </u>	() ()					
TOTAL TRAVEL COSTS \$				1,150		1,150

Project Budget Form

SECTION 2: DETAILED BUDGET CONTINUED

 Year ☒ 1 ☐ 2 ☐ 3

MATERIALS, SUPPLIES AND EQUIPMENT

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
Food Supplies		280		280
Office Supplies/Books		390		390
Incentive Items		400		400
TOTAL COST OF MATERIALS, SUPPLIES, & EQUIPMENT \$		1,070		1,070

SERVICES

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
Room-Use Fee	10 Uses @ \$45/Use	450		450
Photocopy/Binding		200		200
Postage & Shipping		65		65
TOTAL SERVICES COSTS \$		715		715

OTHER

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
TOTAL OTHER COSTS \$				

TOTAL DIRECT PROJECT COSTS \$	12,880	15,477	28,357
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INDIRECT COSTS

Check either item A or B and complete C. (See section on Indirect Costs, page 3.5.)

Applicant organization is using:

- ☒ A. An indirect cost rate which does not exceed 15 percent of modified total direct costs charged to IMLS.
☐ B. Federally negotiated indirect cost rate (see page 3.5).

Name of Federal Agency Expiration

Date of Agreement

Rate base Amount(s)

15 % of \$ 28,357 = \$ 4,254

IMLS Applicant

Total

C. Total Indirect Costs

\$ 1,932 \$ 2,322

\$ 4,254

Project Budget Form

SECTION 2: DETAILED BUDGET

Year ☐ 1 ☒ 2 ☐ 3 - Budget Period from 8 / 1 / 06 to 3 / 31 / 07

Name of Applicant Organization South Coast Railroad Museum

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

SALARIES AND WAGES (PERMANENT STAFF)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
<u>[REDACTED]</u>	()	164 hrs @\$17.43	2,859		2,859
<u>[REDACTED]</u>	()	80 hrs @\$15.10	1,208		1,208
<u>[REDACTED]</u>	()	59 hrs @ \$12.16	717		717
<u>[REDACTED]</u>	(55)	356 hrs @ \$17.19		6,120	6,120
TOTAL SALARIES AND WAGES \$			4,784	6,120	10,904

SALARIES AND WAGES (TEMPORARY STAFF HIRED FOR PROJECT)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
<u> </u>	()	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u> </u>	()	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u> </u>	()	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u> </u>	()	<u> </u>	<u> </u>	<u> </u>	<u> </u>
TOTAL SALARIES AND WAGES \$			<u> </u>	<u> </u>	<u> </u>

FRINGE BENEFITS

RATE		SALARY BASE	IMLS	APPLICANT	TOTAL
<u>[REDACTED]</u> 35.38 %	of \$	2,859		1,008	1,008
<u>[REDACTED]</u> 45.28 %	of \$	1,208		547	547
<u>[REDACTED]</u> 17.28 %	of \$	717		124	124
TOTAL FRINGE BENEFITS \$			<u> </u>	1,679	1,679

CONSULTANT FEES

NAME/TYPE OF CONSULTANT	RATE OF COMPENSATION (DAILY OR HOURLY)	No. of Days (or) HOURS ON PROJECT	IMLS	APPLICANT	TOTAL
<u>[REDACTED]</u>	\$50/hr	10 hrs	500		500
<u>[REDACTED]</u>	\$40/hr	10 hrs	400		400
<u>[REDACTED]</u>	\$45/hr	13 hrs		585	585
<u>[REDACTED]</u>	\$60/hr	20 hrs		1,200	1,200
TOTAL CONSULTANT FEES \$			900	1,785	2,685

TRAVEL

FROM/TO	NUMBER OF: PERSONS DAYS	SUBSISTENCE COSTS	TRANSPORTATION COSTS	IMLS	APPLICANT	TOTAL
2,215 miles @	() ()	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
\$0.35/mile	() ()	<u> </u>	775	775		775
<u> </u>	() ()	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u> </u>	() ()	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
TOTAL TRAVEL COSTS \$				775		775

Project Budget Form

SECTION 2: DETAILED BUDGET CONTINUED

 Year ☐ 1 ☒ 2 ☐ 3

MATERIALS, SUPPLIES AND EQUIPMENT

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
Food Supplies		120		120
Office Supplies/Books		230		230
Incentive Items		404		404
TOTAL COST OF MATERIALS, SUPPLIES, & EQUIPMENT \$		754		754

SERVICES

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
Room-Use Fee	6 Uses @ \$45/Use	270		270
Photocopy/Binding		120		120
Postage & Shipping		125		125
TOTAL SERVICES COSTS \$		515		515

OTHER

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
TOTAL OTHER COSTS \$				

TOTAL DIRECT PROJECT COSTS \$	7,728	9,584	17,312
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INDIRECT COSTS

Check either item A or B and complete C. (See section on Indirect Costs, page 3.5.)

Applicant organization is using:

- ☒ A. An indirect cost rate which does not exceed 15 percent of modified total direct costs charged to IMLS.
☐ B. Federally negotiated indirect cost rate (see page 3.5).

Name of Federal Agency Expiration

Date of Agreement

Rate base Amount(s)

15 % of \$ 17,312 = \$ 2,597

IMLS Applicant

Total

C. Total Indirect Costs

\$ 1,159 \$ 1,438

\$ 2,597

Budget Justification

The roles of the museum's paid staff members are described in Section #7 of the Project Narrative. The accompanying table (Table 1) shows the estimated distribution of hours for each staff member by project task.

Significant portions of the paid-staff's regular-duty hours are currently spent on program grants. Indeed, this has become an essential ingredient of the new financial strategy that has allowed the museum to right itself financially. This commitment to grants income is especially true of the director's position: As much as 25% of his salary now depends on "soft money" (i.e., grants and contracts) funding. Over the 20-month project period, the budget calls for approximately 11.8% of the director's full-time position to be devoted to the proposed project. Similarly, the assistant director will expend about 9.2% of her 5/8-time position on the project over the 20 months, while about 9.7% of the resource development coordinator's time (which averages about 75 hrs./month) will be applied to project tasks. These commitment levels are consistent with the amount of time that each staff member will have available for grants work during the project period. This will be the museum's only major program grant in progress during this time-frame.

The hourly rates for staff members include an expected 4% cost-of-living increase. The fringe-benefits rates include a base rate of 17.28% (FICA 6.2%; Medicare 1.45%; Calif. unemployment ins. 3.1%; state disability ins. 1.18%; worker's comp. 5.25%; Calif. ETT 0.1%) plus vacation & sick leave (8% for [REDACTED]) and medical insurance (\$285/mo. for [REDACTED] and \$299/mo. for [REDACTED], which translate to rates of 10% for [REDACTED] and 20% for [REDACTED]).

The museum has about 55 regular volunteers, all of whom will participate in the project in one capacity or another. These various duties are described under Section #7 of the Project Narrative, which also outlines how consultants will be utilized on the project. The accompanying Table 1 indicates the anticipated distribution of consultant and volunteer hours by project task.

The rates shown for the project consultants are their normal rates or, if a rate does not exist, the consultant was asked to set a rate based on his/her salary and benefits. The hourly rate for volunteers is the National Park Service's VIP ("Volunteers In Parks") rate, which the railroad museum uses when placing a dollar value on the contributions its volunteers make to the interpretive program aboard Amtrak's *Coast Starlight*, a project cosponsored by the National Park Service.

The (maximum) 15% overhead rate used in this budget is under the 20% rate approved for the museum's 2003 IMLS Learning Opportunities Grant. We have no negotiated federal rate, however.

[REDACTED] is a federal-government employee. However, the time that he will devote to the project is personal (off-duty) time. Therefore, we are not matching federal grant dollars with other federal dollars for this budget item.

The mileage item in the budget is for local miles traveled by all project personnel, principally for meetings, at a rate of 35 cents per mile.

The food supplies included in the budget are refreshments for meetings. The "incentive items" in the budget are volunteer appreciation items (mementos, framed certificates, greeting cards, field trips etc.). We have budgeted \$12 per person (67), which includes new volunteers, recruited in fulfillment of Project Goal #1.

The meeting-room budget expense is for 16 meetings held at the Goleta Library at the nonprofit rate of \$35/meeting. No indoor space at the museum site can handle more than 15 persons.

The budget includes the purchase of five books that will be used during the Literature Review phase of the project. These are (i) *The Effective Management of Volunteer Programs* by Marlene Wilson; (ii) *The Docent Handbook* from the National Docent Symposium Council; (iii) *The Volunteer Recruitment (& Membership Development) Book* by Susan J. Ellis; (iv) *Leadership & Management of Volunteer Programs: A Guide for Volunteer Administrators* by James C. Fisher & Kathleen M. Cole; and (v) *The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management* by Katherine Noyes Campbell & Susan J. Ellis.